



FSA University Performance Consultant

Toolkit

October 31, 2002



Toolkit Contents

- ☐ **Performance Consultant Overview**
 - Basics
 - Roles
- ☐ **Proposal Development Overview**
 - Overall proposal to project process
 - Checklist
 - Proposal Development process
 - Proposal Request Form
 - Tracking Process & Form
 - Review Board structure & process
- ☐ **Needs Assessment**
 - Process steps
 - Protocol
- ☐ **Project Tools**
 - Effective Teams materials for meetings, project planning, and project management



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Performance Consultant Basics

Performance Consultants connect channels and units to needed services.

Performance Consulting Goals include:

- ☐ Assist FSA in improving job performance and effectiveness through training and non-training solutions.
- ☐ Position FSAU as a strategic partner in selecting and implementing performance solutions.

Performance Consultant functions:

- Relationship building
- Needs assessment
- Facilitation
- Coaching
- Sales

FSAU Services & Offerings include:

- Logistics / registration / tracking
- Training development and delivery
- Employee development (Career Zone)
- Communications / publications
- Contracting / acquisitions
- Cost analysis
- Metrics & performance assessment *
- Knowledge management
- Project facilitation / management
- Best in business approaches
- Available resources
- Curriculum development *
- eLearning tools *

** Not currently within FSAU*

External services include:

- Accenture
- CTS
- ED / TDC
- Franklin / Covey
- Kinkos / GPO
- NCS
- PSG
- USDA Grad School
- Wallen Davidson

Performance Consulting Roles

FSAU			
Channel / Unit	Lead	Performance Consultant	"Adjunct Faculty"
Schools	Midge	Dwayne / Pennie	Jo Ann Sarah Jeff (PSG)
Students	Bill	Bill	Mary Loafy (PSG)
Financial Partners		(Anne Eckman)	Lorraine (PSG)
CFO	Tim	Chuck	
CIO	Beth	Beth	Pam Wadsworth Mike Rockis
Analysis	Stephen / Sarah	Stephen	Midge Jeff Baker
Ombudsman	Stephen	Stephen	Anita Jeff (PSG)
Communications	Anne E.	Anne E.	Lisa Cain
Contracts	Art	Art	
Human Resources	Tony	Tony / Debbie	Linda Leary
Modernization			Howard (Accenture)
At Large	Anne Vicki Anita	Bill Dwayne Stephen	Skip

All FSAU staff members serve as points of contact who share opportunities with performance consultants.

There are also some who perform specific roles:

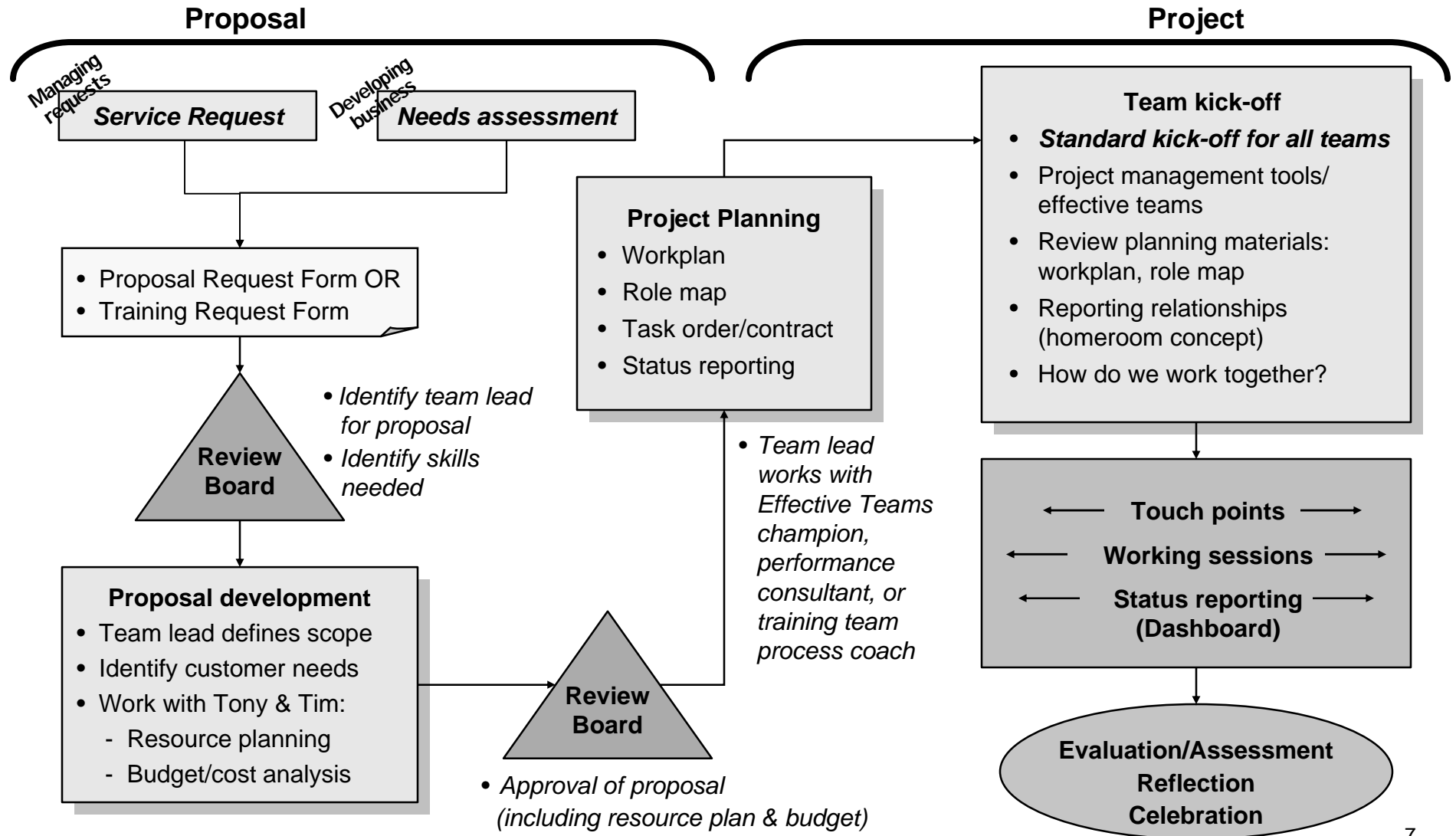
- **Leads** serve as contacts to channels and units. Through existing relationships and knowledge of the unit, they identify areas for performance development or field requests for products/services.
- **Performance consultants** conduct needs assessments, determine approaches, and broker solutions for the customer.
- **"Adjunct Faculty"** denotes representatives from FSAU, channels, units, or operating partners who serve as resources for requests or performance needs.



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Proposal to Project





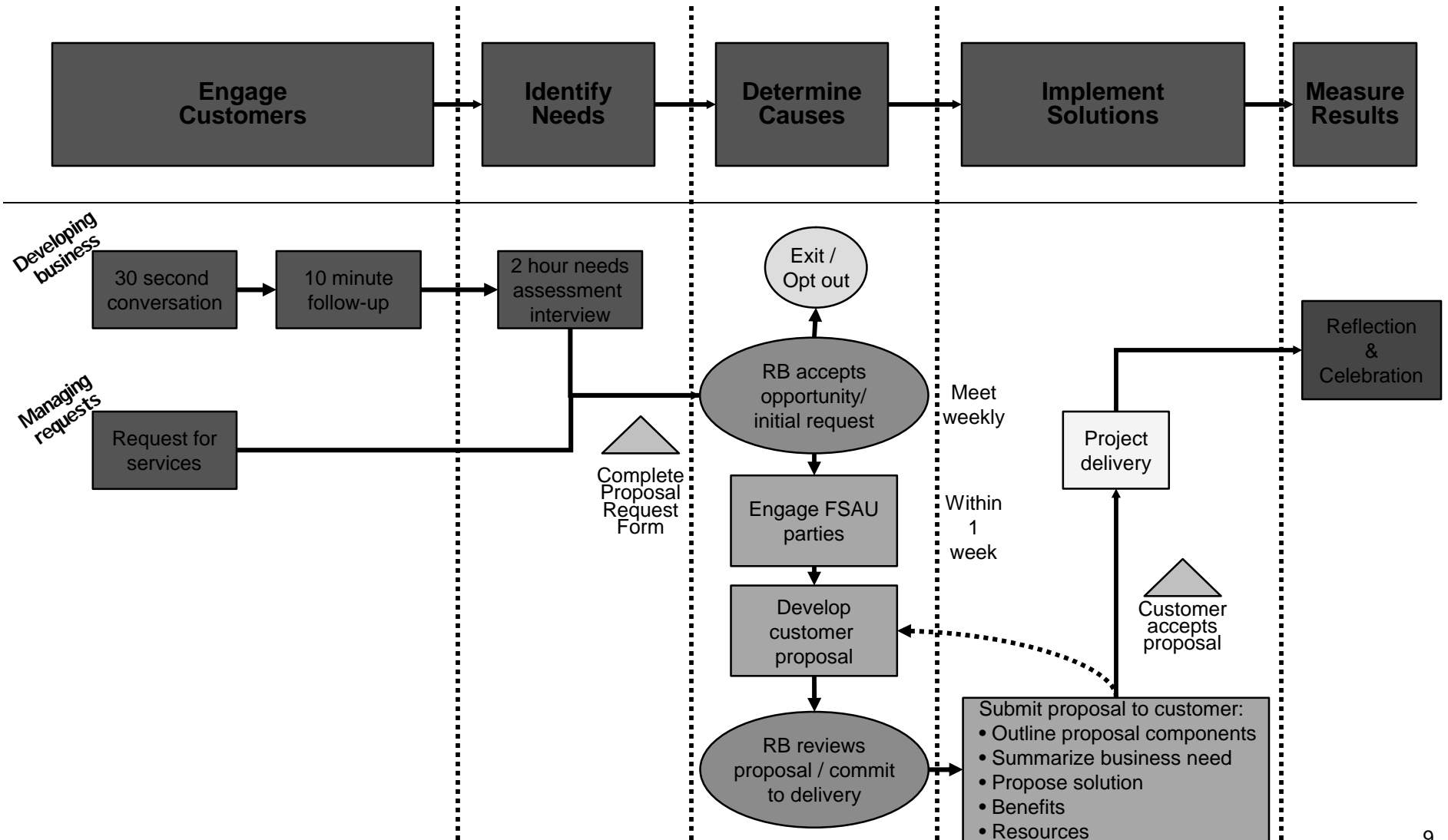
Checklist

Activity

- ☐ Receive request
- ☐ Complete Proposal Request form
- ☐ Add request to tracking process
- ☐ Present initial request to Review Board
- ☐ Conduct resource planning to determine project team
- ☐ Conduct needs assessment
- ☐ Develop proposal
- ☐ Present proposal (including resource plan) to Review Board
- ☐ Present proposal to customer
- ☐ Conduct project planning (with project coach)
- ☐ Maintain tracking information
- ☐ Assessment / Reflection / Lessons Learned

Dates Completed

Consulting Cycle & Proposal Development Process



Proposal Request Form

FSAU Proposal Request Form

Team / Unit			
Sponsor(s)		Primary contact(s)	
Contact phone number		Date submitted	

Please answer the following questions to formally initiate the proposal development process.

Question	Please enter your response in this column
1. What is the situation? Please provide a brief description of the performance issue or request.	
2. What does the customer want? Explain the reason for the request.	
3. What are the intended outcomes? Describe what the team/unit wishes to achieve.	
4. Who is the target audience? Use customer group(s) for whom the performance solution is intended.	
5. Who are the stakeholders? Use individuals and groups affected by the potential solution. Examples include sponsors, channel representatives, etc.	
6. What are the considerations? Use considerations affecting potential performance solutions. Examples include audience diversity, cost, and delivery constraints / requirements.	
7. Required timeframe When should the solution be deployed?	
8. FSAU recommendations Please note the performance consultants' recommendations.	
9. FSAU action Indicate the course of action determined by FSAU to assist with this request.	

DRAFT

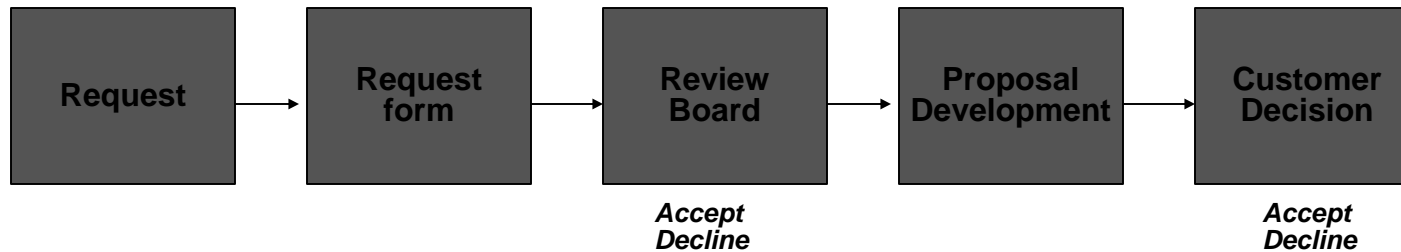
The initial proposal request provides basic data for the Review Board's consideration, including:

General information about the request

Identified audience groups and stakeholders

Delivery considerations, recommendations, and actions

Tracking Process



Tracking number			Project name	FSAU Contact	Requestor	Organization	Audience	Date			Proposal Status		Comments
Year	Month	#						Request received	Presented to R.B.	Submitted to customer			
02	05	1	Facilitated retreat	Stephen	Cindi Reynolds	Analysis	FSA Unit				Review Board		
02	05	2	Interns' policy database		Anthony Jones	Analysis	FSA Unit				Review Board		
02	05	3	Intern Traditions presentation		Dave Rippon	COO	FSA Unit				Review Board		
02	06	1					[Indicate audience]				[Enter status]		
02							[Indicate audience]				[Enter status]		
02							[Indicate audience]				[Enter status]		
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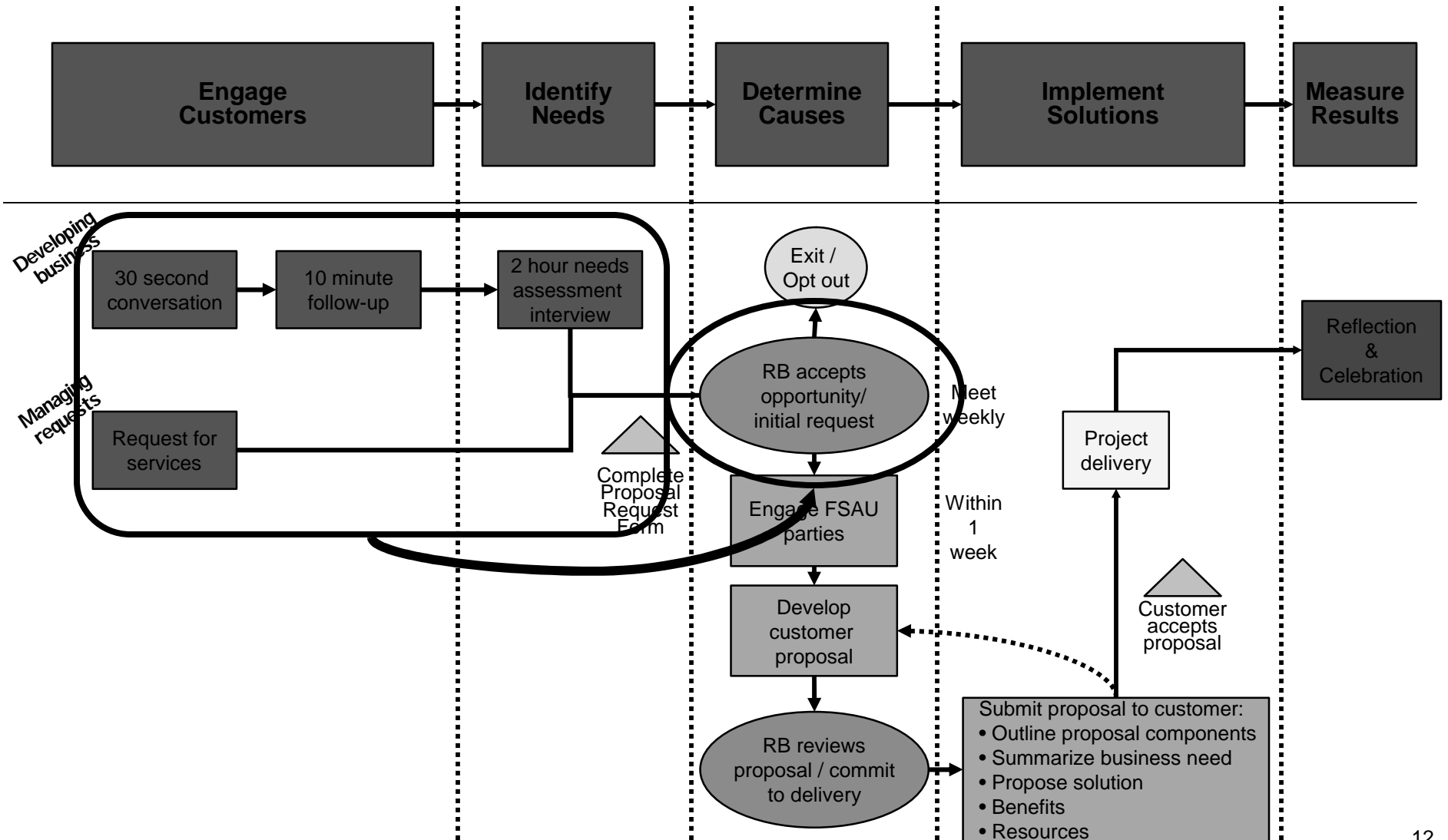
Audience:

- FSA Unit
- FSA-wide
- External Partner(s)

Status:

- Request
- Request form
- Review Board
- Proposal Development
- Customer Decision
- Project

Connection to Review Board





Review Board

Who: FSAU team leads; Dwayne (process owner), Bill (board chair), Anne (strategy), Tony (administration & resources)

When: Scheduled as part of weekly managers meeting, based on demand

Purpose:

I. Determine which projects we will manage

- Review demand and requests for FSAU products/services
- Determine if request is in scope (or should be in potential scope)
- Determine if FSAU will pursue the opportunity

II. Support proposal development

- Determine who will prepare the proposal
 - What skills are needed? Who will be assigned?
- Timeframe / next steps
- Intelligence / advice
- Set appropriate expectations

III. Support proposal delivery

- Review proposal
- Review client needs
- Approve / agree to final proposal OR opt out / exit

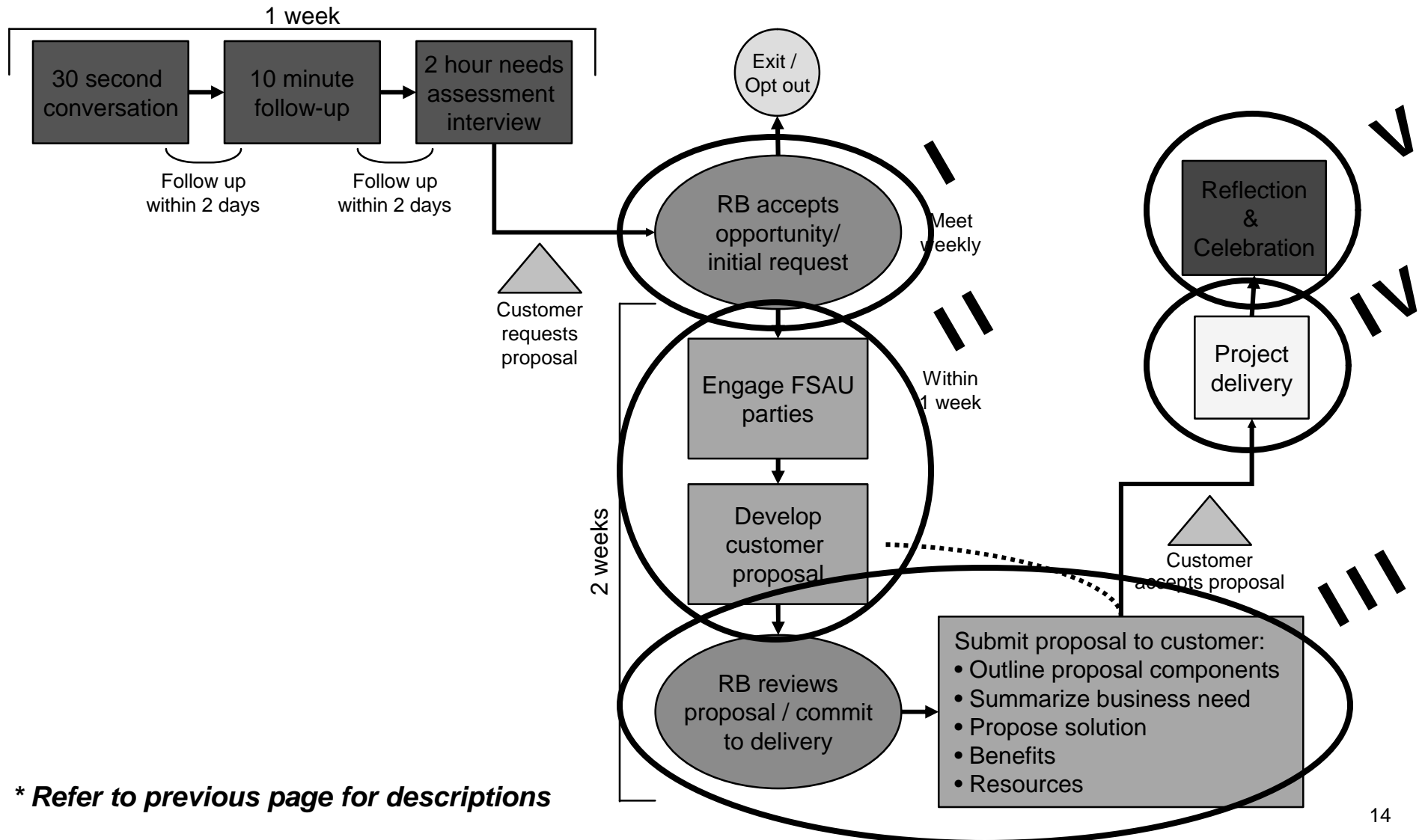
IV. Project oversight

- Review existing projects / opportunities
- Control project work, milestones, and scheduling
- Regular status reporting from delivery team
- Support delivery
- Acknowledge successes
- Assist teams with service recovery

V. Reflection

- Feedback from the customer
- Lessons learned
- Thoughts for future opportunities

Proposal Development Process

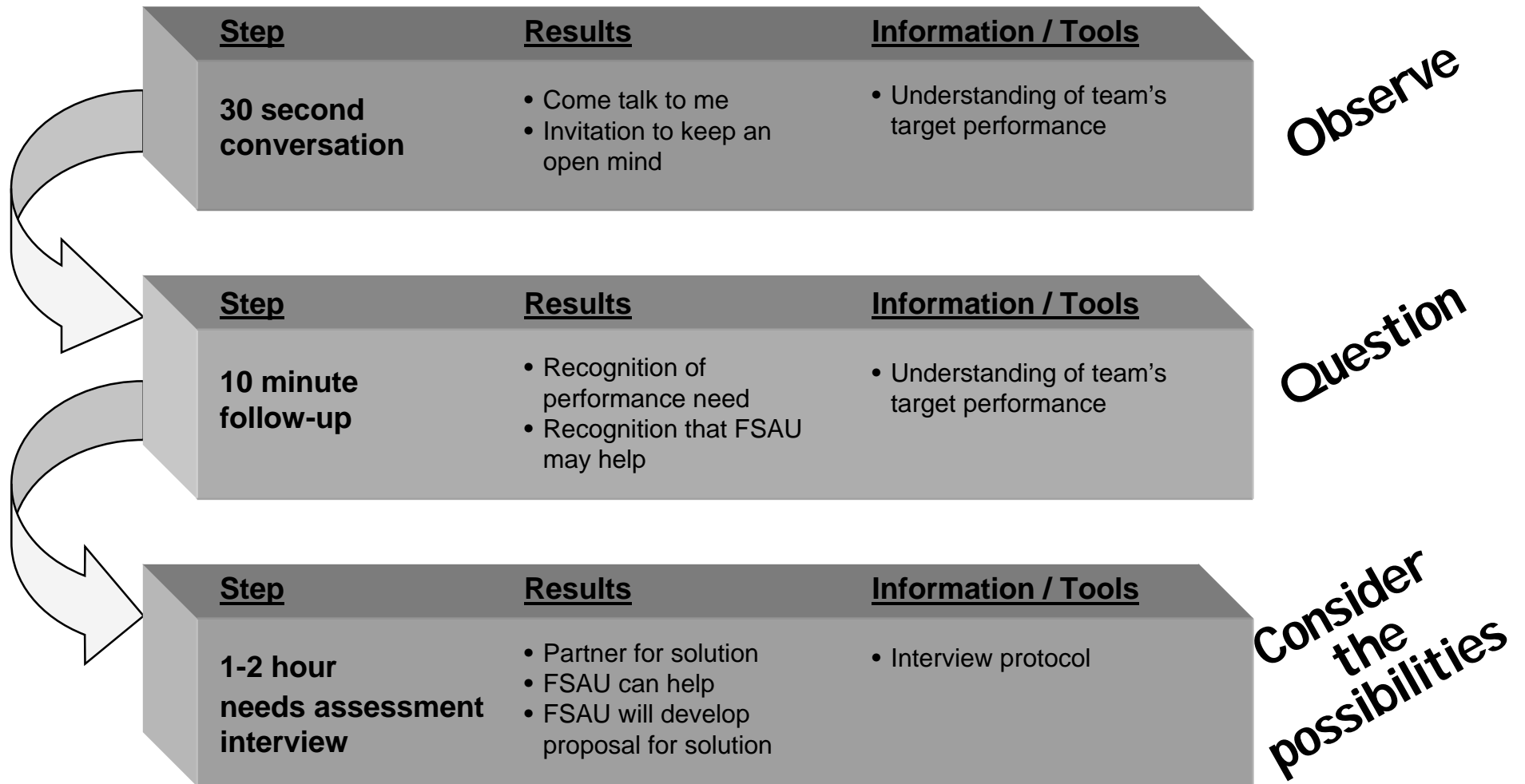




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Needs Assessment





Needs Assessment Step 1: 30 second discussion / request

<u>Step</u>	<u>Results</u>
30 second conversation	<ul style="list-style-type: none">• Come talk to me• Invitation to keep an open mind
<u>Step</u>	<u>Results</u>
10 minute follow-up	<ul style="list-style-type: none">• Recognition of performance need• Recognition that FSAU may help
<u>Step</u>	<u>Results</u>
2 hour needs assessment interview	<ul style="list-style-type: none">• Partner for solution• FSAU can help• FSAU will develop proposal for solution

An initial conversation indicates an opportunity within a team or business unit. This may occur casually, as on an elevator. It may also surface in a discussion of other matters or result from a presentation about FSAU's services and offerings. Since this may arise without provocation, its main purpose is to recognize the opportunity and, subsequently, initiate a fuller conversation about performance needs.

Inquire about performance needs:

- How are you doing on ____?
- What new things are you doing?

Provide basic information about how FSAU can help:

- Validate need
- Establish credibility
- Define / Broaden scope
- Acknowledge the performance need as stated
- Explain what FSAU does, particularly in that area
- Apply FSAU's offering to the stated need

Observe



Needs Assessment Step 2: 10-minute follow-up

<u>Step</u>	<u>Results</u>
30 second conversation	<ul style="list-style-type: none">• Come talk to me• Invitation to keep an open mind
10 minute follow-up	<ul style="list-style-type: none">• Recognition of performance need• Recognition that FSAU may help
2 hour needs assessment interview	<ul style="list-style-type: none">• Partner for solution• FSAU can help• FSAU will develop proposal for solution

This update could be offered in a variety of formats, including a phone call, e-mail, or walk-by meeting. Its purpose is to gather more information about the customer's needs, encourage customers to think about the ongoing work of the organization, and solidify FSAU's role as the appropriate solution provider. At this stage, the goal is to encourage the customer to consider these ideas and concepts, to push the customer's thinking about the performance needs.

Probe for more information

- Begin by restating the information gathered in the earlier conversation
- "As I was thinking about what we discussed..."

Develop a better understanding of the issues and goals

- What's on the team's agenda?
- What's the situation?
- What are the primary concerns?

Ask high-level interview questions (Answers to be considered for next discussion)

- What is the team's target performance?
- What is the team's current performance?
- What are the gaps/needs?

Question



Needs Assessment Step 3: 1-2 hour interview

<u>Step</u>	<u>Results</u>
30 second conversation	<ul style="list-style-type: none">• Come talk to me• Invitation to keep an open mind
<u>Step</u>	<u>Results</u>
10 minute follow-up	<ul style="list-style-type: none">• Recognition of performance need• Recognition that FSAU may help
<u>Step</u>	<u>Results</u>
2 hour needs assessment interview	<ul style="list-style-type: none">• Partner for solution• FSAU can help• FSAU will develop proposal for solution

Before proceeding to this phase, it is important to understand FSA University's core products and services as well as to know the customer's business. After collecting initial data in steps 1 and 2, conduct an interview with the customer to assemble more detailed information. After this interview, FSAU will propose potential solutions to assist with identified needs.

The needs assessment interview covers, in greater detail, the following areas:

- Target performance
- Current performance
- Gaps between target and current performance, thus identifying areas of need
- Root cause(s) of the gaps and resulting performance needs
- Information to identify potential solutions to address performance gaps/needs

Discussion topics:

- What's on the team's agenda?
- What is the target performance (of the work unit / project team)?
- What is the current performance (of the work unit / project team)?
- What are the gaps / needs? (If any)
- What are the best means to achieve the target performance/goals?
- How will the team measure success?

Consider the possibilities



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Project Tools

After the proposal becomes a project, it links to existing Effective Teams Tools.

The central themes of the Effective Teams effort are:

- **Performance driven, results oriented:**

Improved facilitation and decision making ensures we have the right people, working on the right assignments, at the right time.

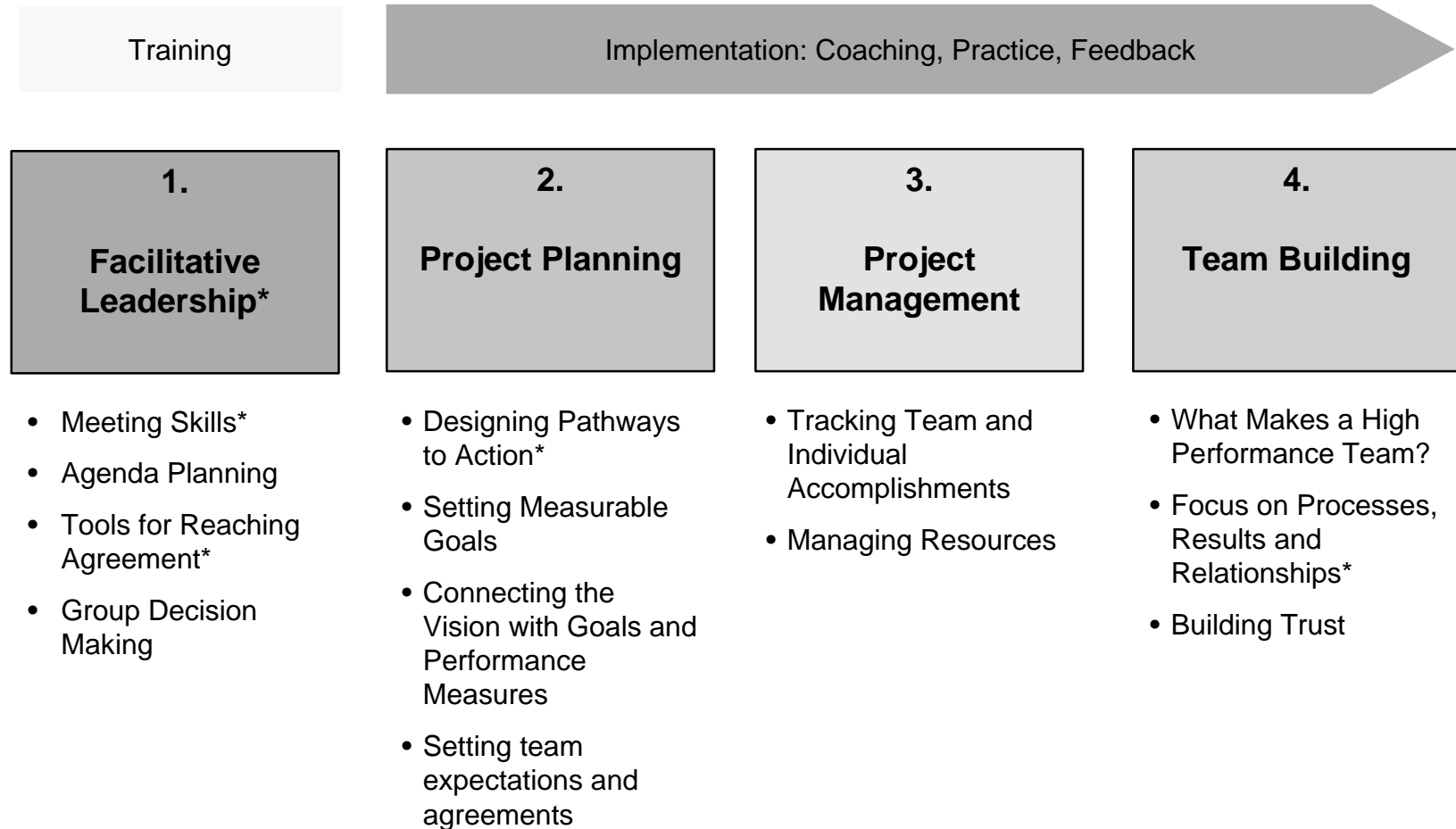
- **Accountability:**

Decisions and tasks will be actionable, trackable, and consistent with the team's overall objectives.

- **Efficiency:**

Processes, templates, and a common language are the foundation for teams achieving results in less time.


Effective Teams Overview



* Copyright Interaction Associates

Meeting Tools

Meeting Checklist




Wednesday, October 30, 2002

Meeting Checklist

Facilitative Leaders set their teams up for success by describing the "big picture" and providing a framework for the planning and problem solving.

What	Who	By When
□ Create agenda	Team Leader	3 days before meeting
□ Review Agenda	Facilitator	2 days before meeting
□ Distribute Agenda and Solicit Feedback	Team Leader to all participants	2 days before meeting
□ Conduct Meeting	All	—
□ Evaluate Meeting	Team Leader, Facilitator, Recorder	After meeting
□ Send out meeting summary: Decisions made, assigned action items, who, and by when	Facilitator, Recorder	1 day after meeting

Meeting Agenda



Wednesday, October 30, 2002

<Meeting Title>

Purpose: <The meeting purpose answers the question, "Why Meet?">

Desired Outcomes: <"A Desired Outcome is what your meeting aims to achieve, the expected result. Desired Outcomes are both written statements, specific and measurable, from the perspective of the participants, nouns not verbs.">

By the end of this meeting, we will have:

□


□

□

Agenda:

What	How	Who	Time
Start Up: - Welcome Purpose - Outcomes Agenda - Roles - Ground Rules - Decision Making		*	*
<Insert new row for each meeting topic>		*	*
		*	*
Meeting Evaluation	* Review Desired Outcomes * Determine re-meeting date/time * +s and -s of this meeting's structure	*	*

Meeting Outcome Summary



Wednesday, October 30, 2002

<Meeting Title> Outcome Summary

Purpose: <Insert "purpose" from the meeting's agenda.>

Desired Outcomes: <Insert status of "desired outcomes" from the meeting's agenda. See example below.>

□ COMPLETE: A prioritization of major decisions
□ TABLED: An agreement on key stakeholders
□ COMPLETE: A verbal agreement on assigned action items

Topic	Decisions Made (Provide background information if necessary)
<insert a new row for each meeting topic on the agenda>	*
	*

Action Items:

What	Who	By When
<insert a new row for each action item description>	*	*
	*	*

Next Meeting:

- Time and Place
- Possible Agenda Items
- Facilitator

Workplans

<Project Name> Workplan Template

ID	Task	Responsible	Date	Milestone	Comments/Status
			Start	Finish	Y/N
Visualize					
1.	Determine Stakeholder Needs				
2.	Interview stakeholders				
3.	Prioritize stakeholder needs				
4.	Complete stakeholder analysis description				
5.	Develop Vision Statement				
6.	Conduct Kick-Off Meeting				
7.	Determine elements of project's vision & scope				
8.	Complete Mtg. Outcome Summary				
9.	Create project description				
10.	Management Sign-off				
11.	<Insert additional rows for other project specific milestones and tasks>				
Plan					
12.	Define & prioritize performance factors (Cost, Time, Quality/Scope)				
13.	Determine risks/ potential obstacles				
14.	Identify Milestones				
15.	Create Milestones and Timeline Chart				
16.	Create Workplan				
17.	Identify Major and Minor pieces				
18.	Determine tasks				

Effective Teams Workplan Template.doc

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10/30/2012

Workplans Include:

- Team tasks
- Individual responsible
- Due dates
- Milestone (Y/N)
- Other comments/status



Timeline & Milestones Chart



<Project Name> Timeline & Milestones


	January 20__				February 20__				March 20__			
Activities:	<div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> Use this Timeline when your project is 3 months in duration. </div>											
Decisions:												
Meetings:												

◊ = Agreed Milestone
◆ = Changed/New Milestone

10/30/2002



Status Reporting



FSA U Status Report

<Enter Project Name>
Reporting Period: xxxxxxxx - xxxxxxxx

Team Lead:
Team Members:
Project Start Date:
Project End Date:


Overall Status

Overall Project Status: <ENTER STATUS>

Red-High Risk
Yellow-Moderate Risk
Green-Low Risk

Change: <ENTER CHANGE>

Delay, None, Same



High Risk - Significantly impacts project schedule and/or major issues. (w) 4+ weeks over schedule

Medium Risk - Minor schedule and/or manageable issues. (w) 2-4 weeks over schedule

Low Risk - On schedule and no significant issues. (w) 0-2 weeks over schedule

The information above will be incorporated into an FSA U dashboard for Anne.

Accomplishments & Awards:

Major Accomplishments Since Last Report	Upcoming Activities

Issues Requiring Management Attention/Action:

Date	Issue	Recommendation & Person Responsible	Status	Priority

Status: N - New, IP - In Progress, O - Ongoing, R - Resolved
Priority: H - High, M - Medium, L - Low

Workplan Last Updated: <ENTER DATE>
Timeline & Milestones Chart Last Updated: <ENTER DATE>

Notes:

Other points to report not pertaining to project completion.

Page 1 of 1

How Often Are Status Reports Due?

Twice a month (the Friday closest to the 15th and 30th of each month). You will receive an email reminder two days before it is due.

Who Prepares the Status Report?

The Project Team Lead prepares the report after soliciting input from each team member.

What Is It Used For?

Status Reports will help us formally communicate project accomplishments, issues, and milestones with each other.

Who Should I Send the Report To?

Tony Andrade and cc: the manager in charge of the initiative. Tony will print all status reports and provide an overall report to Anne.

How Often Do I Need To Submit My Workplan and Milestone Timeline?

All **new** projects should submit a Workplan and Milestone Timeline with the first status report. The only time you need to re-submit your Workplan or Milestone Timeline is when MAJOR dates change.

Proposal to Project

